This Training Guide walks users through initiating and submitting amendments for the following scenarios:

- Scenario One: Change Quantity or Unit Cost
- Scenario Two: Add or Delete a Line Item (returns)
- Scenario Three: Amend Payment Terms
- Scenario Four: Add or Change Payment Info Tab
- Scenario Five: Make Changes to a Capital Asset Order
- Scenario Six: Accounting Changes
- Scenario Seven: Change Vendor Division/Address

Keep in mind:
- Anyone in the workflow or with Role 54 access can initiate an amendment. If needed, request access from Department Security Administrator (DSA).
- Amendments can only be processed on Purchase Orders with an Open Status.
  - Note: UCIbuy generated orders can only amend accounting lines if there are no payments made against the Purchase Order.
- Amendments should only be processed for internal use only.
  - If the supplier requires proof of changes to the Purchase Order, the Contract Manager needs to process a Letter of Explanation (via email, fax or regular mail) to provide a clear account of any modifications made.

Steps to Initiate an Amendment

Step 1: Access Portal.
A. Go to portal.uci.edu, log on and select Finances/KFS.
B. Navigate to the Purchasing portlet.
C. Select the + button next to Custom Document Search and select Purchase Orders.
Step 2: Enter Search Criteria.
A. Type field defaults to PO.
B. If the current purchase order document number is known, type the number in Document/Notification ID field.
C. If the purchase order number is known, type the number in Purchase Order # field.

Additional search instructions are located at Portal > Finances/KFS > Purchasing > Training and Resources > KFS Purchasing Training Guides > Purchase Order (PO) Fundamentals Training Guide > pages 10 – 11.

D. Select Document/Notification Id link that has Open listed under Purchase Order Status Description column to view Purchase Order.

Step 3: Select correct amend button.
A. Amend (used for non-UCIBuy orders)
B. Amend accounting lines only is used to only change accounting information.
   - This option can only be used if there are no payments against the line item and is also a non-Capital Asset related item. See Scenario Six for more details and instructions.

When a POA is initiated, a new document is created. The PO number will always remain the same.
Step 4: Provide Reason.

A. Provide detailed explanation of changes.
B. Select yes button.
C. This description appears in the Notes and Attachments field.

Scenario Instructions

Complete steps outlined in applicable scenario and proceed to Step 5.

Scenario One: Change Quantity or Unit Cost.

A. Change Quantity for applicable Item Line.
   - Enter new amount in the Quantity field (e.g. only 15 available, change from 20 to 15 EA).
B. Increase or reduce item amount (must be equal or greater than what has already been paid against the Item Line).
   - Enter new amount in Unit Cost field (e.g. decrease Unit Cost from $21.45 to $20.45).

Change takes effect after the save button is selected at the bottom of the document.
Scenario Two: Add or Delete a Line Item.

A. To add an item (e.g. additional supplies needed to complete a repair), go to the Add Item tab and enter in Item Line information.
   - Another alternative is to complete a new requisition for the additional items.
B. Once complete, select the add button under the Actions column.
C. Select show in the Accounting Lines section and fill out applicable fields.
   - Once complete, select add.

D. To delete item (e.g. supplier confirmed item is no longer available and won’t be received), select the void line button.
   - New order total is updated after calculate is selected.

Scenario Three: Amend Payment Terms of PO or Contract (only can be processed by a Contract Manager).
A. Go to Vendor tab and use the drop-down menu and select the correct Payment Terms.
Scenario Four: Add or Change Payment Info Tab.
A. Select the **Recurring Payment** box.
B. Enter the **Begin / End Date**.

The Payment Info tab is for internal use only and does not change the terms of the Purchase Order agreement.

Scenario Five: Capital Asset Change.
A. Correct the **Object Code**.
   - Object code is editable if there are no payments against the line.
     - Type new object code over existing.
   - Change from Equipment object code to another Equipment object code.
     - No change needed to the Capital Asset tab.
   - Change from Equipment object code to a Supply object code.
     - Select the **change** button to clear tab.
   - Change from Supply object code to Equipment code.
     - Fill out **Capital Asset** tab per Capital Asset Training Guide.

Capital Asset instructions are located at Portal > Finances/KFS > Purchasing > Training and Resources > KFS Purchasing Training Guides > Requisition for Capital Asset Training Guide >
**Scenario Six: Accounting Changes.**

**Option One:** amend accounting lines only.
Used for an accounting change on an Item with no payments against it (see the Amount Paid field in the Current Items section to verify first).

A. Select amend accounting lines only button.
   - This option can be used for UCIBuy orders with no payments against it and non-Capital Asset Purchase Orders.
B. Go to the accounting line to be changed and select the show button.
C. Type the correct account in the Accounting Lines field.

**Option Two:** Accounting change on an Item with partial payments made against it.
**Reminder:** Cannot be used for UCIBuy orders.

A. Select the amend button.
B. Reduce the existing Item to the amount paid (e.g. $172.97 + tax = $188.01).
C. Select the clear all tax button above the Current Items section to ensure that tax calculates correctly.
D. Create a new Line Item for the difference with the correct Account information.

A General Error Correction (GEC) must be completed to correct any payments that have already been processed (e.g. Item 1 processed payment of $188.01).
**Scenario Seven:** Change Vendor Division/Address (can only be done on an order with no payments against it and can only be processed by a Contract Manager).

A. Go to the **Vendor** tab and select the icon to search for possible divisions.
B. Select **search** (Vendor # already pre-populated in field).
C. Select **return value** to return the selection to the document if applicable.

Changes can only be made within the same Vendor Family (E.g. 5023-0 to 5023-1, etc.).
Step 5
Save, calculate and submit the Amendment

A. Scroll down and select **save**.
B. Scroll down and select **calculate** to update the **Items** tab with tax and order totals.
C. Scroll down and select **submit**.
   - Amendment routes to the Fiscal Officer for approval.
   - Once approved, it routes to the Contract Manager on the Purchase Order.